



30 May.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,586	(0.4) %	3.7 %
BSE SENSEX	34,949	(0.6) %	4.7 %
CNX BANK	26,147	(0.4) %	7.5 %
CNX MIDCAP	18,952	(0.2) %	(0.8) %
CNX SMALLCAP	7,925	(0.1) %	(0.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,361	(1.6) %	(1.9) %
S&P 500	2,690	(1.2) %	(0.2) %
FTSE 100	7,633	(1.3) %	(0.2) %
HANG SENG	30,485	(1.0) %	(0.1) %
NIKKEI	22,358	(0.6) %	(4.9) %
SHANGHAI COMPOSITE	3,120	(0.5) %	(6.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.87	0.7 %	6.6 %
EUR/USD	1.15	(0.9) %	(4.1) %
GBP/USD	1.32	(0.5) %	(2.0) %
USD/JPY	108.54	(0.4) %	(3.7) %
USD/AUD	1.34	0.5 %	4.5 %
USD/SGD	1.35	0.2 %	0.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	(1.7) %	10.5 %
Gold(INR/10g)	31,185	0.9 %	6.2 %
Gold Comex(USD/oz)	1,303	0.0 %	(0.4) %
SILVER(INR/1Kg)	39,701	0.9 %	2.8 %
Aluminium(USD/MT)	2,260	(1.0) %	0.2 %
Copper(USD/MT)	6,842	(0.6) %	(4.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.1) %	0.3 %

Global Economy: The Trump administration said it would proceed with tariffs on \$50bn in Chinese imports and broader investment restrictions, rebooting a trade war with Beijing that it claimed was “on hold” less than two weeks ago. The new tariffs, to be formally unveiled in two weeks, are intended to punish Beijing for what President Donald Trump has argued is a systematic campaign by China to steal US technology. European equities slumped on media reports that the Italian President had blocked the proposed finance minister. This boosted the US Dollar index to a multi month high near 95 levels.

Global Equities: US stocks also sank amid political turmoil in Italy. The Dow Jones industrial average fell 391.64 points – or 1.58% amid heavy losses in Goldman Sachs, Boeing, and J.P. Morgan Chase. At its lows, the index lost more than 500 points, or 2%.

Indian Economy: The southwest monsoon has further advanced into remaining parts of southeast Arabian Sea, Comorin – Maldives area, entire Lakshadweep, most parts of Kerala, some parts of Tamil Nadu and some more parts of southwest, central and northeast Bay of Bengal. The southwest monsoon has set in over Kerala, yesterday, the 29th May 2018, 3 days ahead of its normal date. The Northern Limit of Monsoon (NLM) passes through Lat. 120N/ Long 600E, Lat 120N/ Long 650E, Lat.120N/ Long 700E, Kannur, Coimbatore, Kodaikanal, Tuticorin, Lat. 090N/ Long 800E, Lat. 130N/ Long 850E, Lat.180N/ Long 900E, Lat. 210N/ Long 930E. Figure-1 shows the Northern Limit of Monsoon (NLM) as on yesterday. Widespread rainfall occurred over Kerala, during the past 3-4 days. The 14 rainfall monitoring stations for Monsoon onset over Kerala have reported more than 60% rainfall from 25th May.

Equity Markets: The local market declined after a volatile session, weighed by slide in banks stocks. The Sensex settled below the psychological 35,000 mark after sliding below that level in intraday trade. Shares of index heavyweight HDFC declined. Negative global cues dampened sentiment. Domestic stocks nudged lower in early trade on negative Asian stocks. A bout of volatility was seen in morning trade as the key benchmark indices gyrated in positive and negative zone. Key benchmark indices hit fresh intraday high in positive zone in afternoon trade. Market once again turned weakened in mid-afternoon trade. Fresh selling pulled the key benchmark indices to fresh intraday low in late trade.

Corporate News: BPCL's net profit rose 45.2% to Rs 2673.64 crore on 14.4% increase in net sales to Rs 65239.31 crore in Q4 March 2018 over Q4 March 2017. The result was announced after market hours yesterday, 29 May 2018. On a consolidated basis, Glenmark Pharmaceuticals' net profit fell 17.48% to Rs 151.63 crore on 7.28% decline in net sales to Rs 2247.89 crore in Q4 March 2018 over Q4 March 2017. Power Grid Corporation of India's net profit rose 4.6% to Rs 2004.68 crore on 16.5% increase in net sales to Rs 7811.32 crore in Q4 March 2018 over Q4 March 2017. Jubilant FoodWorks will be watched. With reference to the news report regarding stake sale by the promoters in Jubilant FoodWorks, the company clarified that the report is completely incorrect and baseless. Shares of state-run oil marketing companies--BPCL, HPCL and Indian Oil Corporation--will be watched after petrol and diesel prices were cut for the first time after 16-day continuous hike. The price of petrol was reduced by Rs 0.60 today, 30 May 2018, to Rs 85.65 a litre in Mumbai and diesel was cut by Rs 0.59 to Rs 73.20 a litre.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	56.3	(66.6)	(56.2)
MF(INR cr)	774.0	619.8	555.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,357	33,932	33,944
F&O(INR cr)	1,000,152	807,400	774,835

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.0	14.1	16.1
NSE VIX	13.1	13.6	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,255	(1.4) %	7.9 %	Energy	13,447	0.0 %	1.2 %
IT	13,561	0.5 %	6.7 %	Pharma	8,410	(1.0) %	(2.4) %
Metals	3,607	0.1 %	1.9 %	Finance	10,896	(1.1) %	6.2 %
Auto	11,051	0.4 %	(0.1) %	PSU	2,940	(3.0) %	3.0 %
FMCG	28,706	(0.3) %	8.3 %	Real Estate	297	(1.0) %	0.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
B H E L	83	5.3 %	1.2 %	Aurobindo	579	(4.4) %	(2.3) %
General In	750	3.0 %	1.4 %	Siemens	1,049	(3.5) %	(4.8) %
United Spi	3,386	3.0 %	3.7 %	Bank of Ba	140	(3.4) %	(1.1) %
Bosch	18,557	2.6 %	0.2 %	Punjab Nat	86	(3.4) %	(11.1) %
Oil India	226	2.5 %	(0.6) %	ICICI Bank	290	(3.1) %	10.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (APR)	30-05-2018	1:30	AUD	-	0.026
Building Approvals (YoY) (APR)	30-05-2018	1:30	AUD	-	0.145
Current Account Balance (1Q)	30-05-2018	12:30	CAD	-	-
Industrial Product Price (MoM) (APR)	30-05-2018	12:30	CAD	-	0.008
Raw Materials Price Index (MoM) (APR)	30-05-2018	12:30	CAD	-	0.021
Bank of Canada Rate Decision (30 MAY)	30-05-2018	14:00	CAD	-	0.0125
SNB's Jordan Speaks in Solothurn	30-05-2018	14:45	CHF	-	-
KOF Leading Indicator (MAY)	30-05-2018	7:00	CHF	-	105.3
Credit Suisse Survey Expectations (MAY)	30-05-2018	8:00	CHF	-	7.2
IMF Press Conference on End of China Article IV Consultation	30-05-2018	6:00	CNY	-	-
German Consumer Price Index (MoM) (MAY P)	30-05-2018	12:00	EUR	-	0
German Consumer Price Index (YoY) (MAY P)	30-05-2018	12:00	EUR	-	0.016
German Import Price Index (MoM) (APR)	30-05-2018	6:00	EUR	-	0
German Import Price Index (YoY) (APR)	30-05-2018	6:00	EUR	-	(0.001)
German Retail Sales (MoM) (APR)	30-05-2018	6:00	EUR	-	(0.006)
German Retail Sales (YoY) (APR)	30-05-2018	6:00	EUR	-	0.013
French Gross Domestic Product (QoQ) (1Q P)	30-05-2018	6:45	EUR	-	0.003
French Gross Domestic Product (YoY) (1Q P)	30-05-2018	6:45	EUR	-	0.021
German Unemployment Change (000's) (MAY)	30-05-2018	7:55	EUR	-	-
German Unemployment Claims Rate s.a. (MAY)	30-05-2018	7:55	EUR	-	0.053
Euro-Zone Business Climate Indicator (MAY)	30-05-2018	9:00	EUR	-	1.35
Euro-Zone Consumer Confidence (MAY F)	30-05-2018	9:00	EUR	-	0.2
Euro-Zone Economic Confidence (MAY)	30-05-2018	9:00	EUR	-	112.7
Euro-Zone Industrial Confidence (MAY)	30-05-2018	9:00	EUR	-	7.1
Euro-Zone Services Confidence (MAY)	30-05-2018	9:00	EUR	-	14.9
OECD Economic Forecasts	30-05-2018	9:00	EUR	-	-
GfK Consumer Confidence (MAY)	30-05-2018	23:01	GBP	-	(9)
Lloyds Business Barometer (MAY)	30-05-2018	23:01	GBP	-	32
BOJ Consumer Confidence Survey at Conference	30-05-2018	9:00	JPY	-	-



BOJ Outright Bond Purchase 10~25 Years	30-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	30-05-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	30-05-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (25 MAY)	30-05-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (25 MAY)	30-05-2018	23:50	JPY	-	-
Industrial Production (MoM) (APR P)	30-05-2018	23:50	JPY	-	0.014
Industrial Production (YoY) (APR P)	30-05-2018	23:50	JPY	-	0.024
Japan Buying Foreign Bonds (Yen) (25 MAY)	30-05-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (25 MAY)	30-05-2018	23:50	JPY	-	-
Consumer Confidence Index (MAY)	30-05-2018	5:00	JPY	-	43.6
RBNZ's Orr at Parliament Select Committee on FSR	30-05-2018	1:10	NZD	-	-
MBA Mortgage Applications (25 MAY)	30-05-2018	11:00	USD	-	(0.026)
ADP Employment Change (MAY)	30-05-2018	12:15	USD	-	-
Advance Goods Trade Balance (APR)	30-05-2018	12:30	USD	-	-
Core PCE (QoQ) (1Q S)	30-05-2018	12:30	USD	-	0.03
Gross Domestic Product Annualized (QoQ) (1Q S)	30-05-2018	12:30	USD	-	0.023
Gross Domestic Product Price Index (1Q S)	30-05-2018	12:30	USD	-	0.02
Personal Consumption (1Q S)	30-05-2018	12:30	USD	-	0.011
Retail Inventories (MoM) (APR)	30-05-2018	12:30	USD	-	(0.004)
Wholesale Inventories (MoM) (APR P)	30-05-2018	12:30	USD	-	0.003
U.S. Federal Reserve Releases Beige Book	30-05-2018	18:00	USD	-	-
Fed to Hold Board Meeting to Discuss Volcker Rule Changes	30-05-2018	19:00	USD	-	-

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